A Comprehensive Guide to Field Service Operations

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Introduction

According to a Gartner report, by 2020 more than 75% of field service organizations with over 50 users will deploy mobile apps that go beyond simplified data collection and add smart capabilities that empower service technicians. In fact, latest data shows that 40% of field service organizations grew by utilizing field service management (FSM) software in 2020 and 2021.

What is a field service operations software?

Field service management software helps businesses manage executives and technicians that are on the field completing service requests. It helps them streamline work or job orders, automate scheduling and dispatch, allocate jobs track service technician productivity, and more.

Challenges in field service operations

- No visibility on the field technicians
- Low first-time fix rate leading to unhappy customers
- Manual job allocation
- Heavy reliance on paperwork
- Higher turnaround time for completing jobs
- Lack of a system to measure service agent productivity

Field service operations use cases across industries

Manufacturing and industrial

Manufacturers get access to real-time inventory updates and make informed decisions about production and scheduling. They manage and track technicians, get detailed reports to allow manufacturers to forecast revenue and predict demand.

Engineering

Utility engineers and technicians can access job status, customer availability, inventory management, and more with FSM software.

Telecom

Service technicians can use an FSM mobile app to access work orders on the go. It helps them complete their tasks, update real-time job status and improve their productivity.

Marine industry

With FSM, companies can get real-time supply chain visibility of their global shipments and ensure service level agreement (SLA) delivery times by using advanced GPS rerouting.

Utilities

The utility sector with departments like power, water, and public transport can use FSM to manage service technicians almost instantaneously in case of breakdown repairs.

Healthcare

Pharmacies and pathology laboratories can leverage FSM system to offer doorstep services like medicine delivery and home blood and urine sample collection.

Construction

Having real-time inventory available allows technicians to complete construction jobs efficiently. FSM software comes with an inventory management feature that facilitates smoother service calls, less paperwork, tracking equipment, and more.

Services

FSM software streamlines field technician jobs like home or office cleaning, electronic devices maintenance and repair, among others.

Field service operations software features

A field service management platform boasts of a range of features that help you efficiently manage technicians and tasks based on location. Most of them offer a dedicated web view for supervisors and a mobile app for technicians. Here are some of the key features to look out for in FSM software.
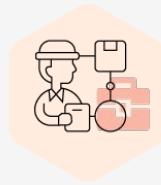
Inventory management

With inventory management, technicians can ensure they have exactly what they need before starting their service call, resulting in higher first-time fix rates (FTFR) and more satisfied customers. Several systems can integrate analytics with their inventory software and create demand forecasts.

Work order management

Work order management enables managers and supervisors to organize, schedule, and manage work orders for their field technicians. With a work order management feature, you can easily create and streamline work orders, customer requests, track daily orders, and more. It offers a real-time update on job status and monitors SLA compliances.

Reports and dashboards

FSM gathers and analyzes high-volume data offering valuable insights to improve the efficiency of the end-to-end processes. Managers can track individual and team productivity that helps to improve the quality of work, and efficiently manage time and resources. It also offers leaderboards for executives to boost competition, thereby leading to finishing more jobs in a day.
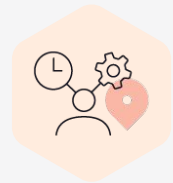
Intelligent job allocation

Manual job allocation or using legacy systems can lead to high idle time for technicians or missed opportunities. You will be on top of your service requests with FSM software as it auto allocates the right job to the right technician. It considers vital factors such as skill, availability, priority, and proximity while allocating a specific job.
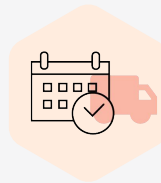
Scheduling and dispatch

Supervisors get complete visibility on the service executive performance, which helps them in scheduling jobs. The system automates your service technicians' scheduling and dispatch activities to help reduce costs and cater to higher service requests. Once jobs are scheduled, executives are automatically notified about the type and location of their next job.
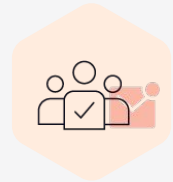
Capacity planning

Some FSM software also offers intelligent capacity management with auto-calculation for streamlining incoming orders in real-time. It showcases available slots for field technicians based on their capacity and skill sets.
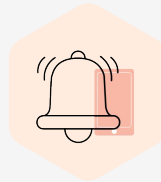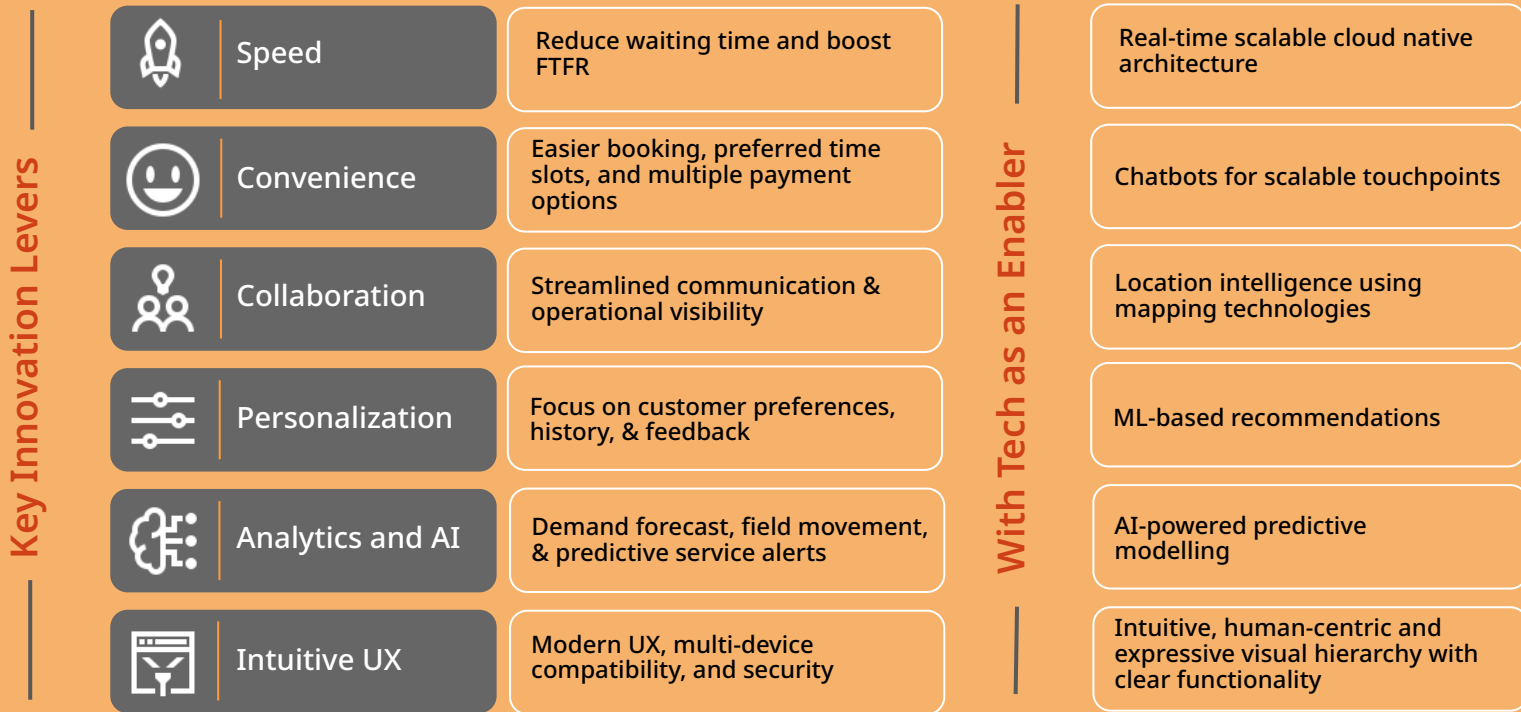
Nudges

The system can be configured to send contextual push notifications/ nudges to the service technician app that helps them finish their tasks more efficiently. One of the main aims of nudges is to guide them to focus on jobs and provide information like upcoming jobs/work orders, inventory pickup reminders, and job reschedules, etc.

Field service modernization: Key takeaways

Field service management can innovate to be a strategic advantage with digitalization.

Key Innovation Levers

Lever	Description	With Tech as an Enabler
Speed	Reduce waiting time and boost FTFR	Real-time scalable cloud native architecture
Convenience	Easier booking, preferred time slots, and multiple payment options	Chatbots for scalable touchpoints
Collaboration	Streamlined communication & operational visibility	Location intelligence using mapping technologies
Personalization	Focus on customer preferences, history, & feedback	ML-based recommendations
Analytics and AI	Demand forecast, field movement, & predictive service alerts	AI-powered predictive modelling
Intuitive UX	Modern UX, multi-device compatibility, and security	Intuitive, human-centric and expressive visual hierarchy with clear functionality

The future of field service operations

The complexity of assets will continue to expand further, and businesses will need dynamic and fast ways to manage their field service operations. Businesses will look for simpler ways to further empower service technicians anytime and anywhere. Systems that can offer instant solutions and significant insights for technicians will take center stage. The focus will be on leveraging automation, AI/ML engines, and mobile capabilities to increase their productivity.

A well-equipped field service management software will enhance your operational efficiency, offer deeper visibility in your field workforce, and boost customer satisfaction.

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